


Creating and Viewing Case Notes

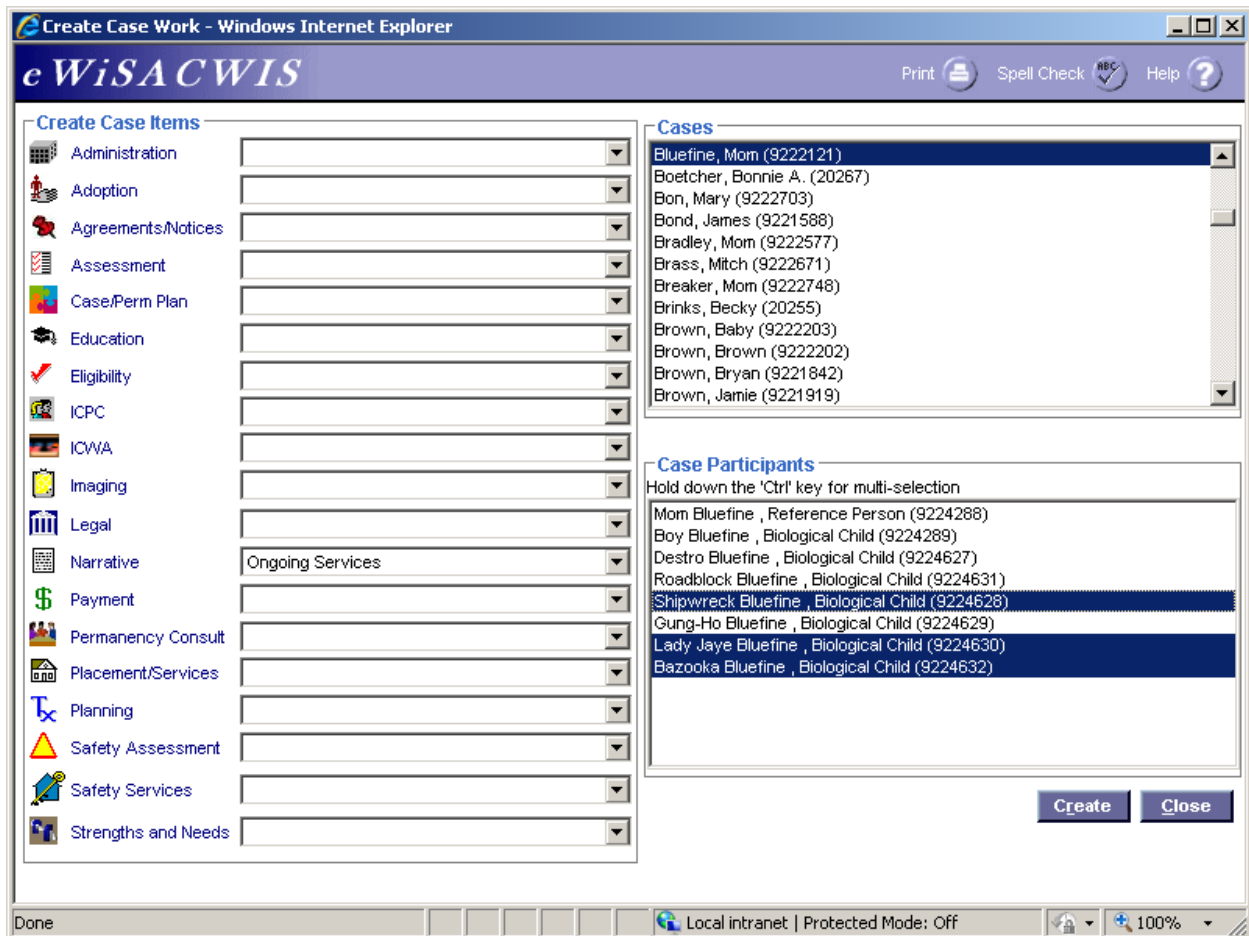
Note: In order to create a case note, an assignment to the case is not needed. Additionally, a case note can be created on a closed case.

Creating Case Notes on Assigned Cases

1. Create a case note using one of two methods:

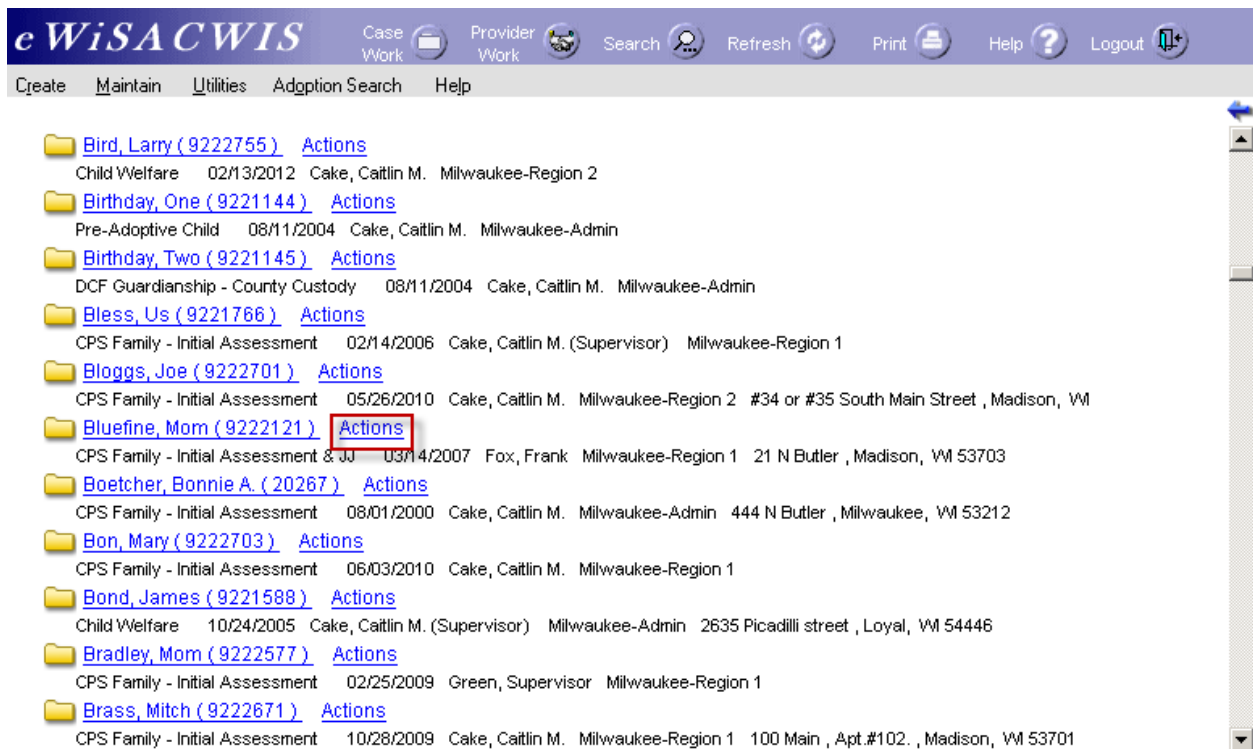
- From your desktop, click the Case Work hot button . This will open the Create Case Work page.

Select the Category from the Narrative drop-down and select the Case. The selection of case participants is optional; use the 'ctrl' key to select more than one participant. Click Create. This will open the Case Notes page.



The screenshot shows the 'Create Case Work' web application in a Windows Internet Explorer browser window. The page has a purple header with the 'eWiSACWIS' logo and navigation links like 'Print', 'Spell Check', and 'Help'. The main content area is divided into two columns. The left column, titled 'Create Case Items', contains a list of categories with corresponding icons and dropdown menus: Administration, Adoption, Agreements/Notices, Assessment, Case/Perm Plan, Education, Eligibility, ICPC, ICWA, Imaging, Legal, Narrative (currently set to 'Ongoing Services'), Payment, Permanency Consult, Placement/Services, Planning, Safety Assessment, Safety Services, and Strengths and Needs. The right column contains two sections: 'Cases' and 'Case Participants'. The 'Cases' section is a list box showing various case names and IDs, with 'Bluefine, Mom (9222121)' at the top. The 'Case Participants' section includes a note to 'Hold down the 'Ctrl' key for multi-selection' and a list of participants, with 'Shipwreck Bluefine, Biological Child (9224628)' selected. At the bottom right of the right column are 'Create' and 'Close' buttons. The browser's status bar at the bottom shows 'Done', 'Local intranet | Protected Mode: Off', and a zoom level of '100%'.

b) From your desktop, click the Actions hyperlink next to your case. This will open the Actions page.



On the Actions page, select Create Case Note and click Continue. This will open the Case Notes page.



2. On the Case Notes page, there is an option to search out the Worker Making Contact if it is not you (the person creating the case note). Click the Search hyperlink to search the worker making contact. Enter the Date, Type, Face-to-Face Location (if applicable), Face-to-Face Result (if applicable), and the Narrative. The case note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked or 30 days have passed, the note will be frozen and no longer editable. Click Save to save your changes. The Create button creates a new Case Note for the same case. The Clear Fields button will blank out all of the fields on this note. For the Insert Correction Note button, see the associated Creating Correction Notes Quick Reference Guide.


Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

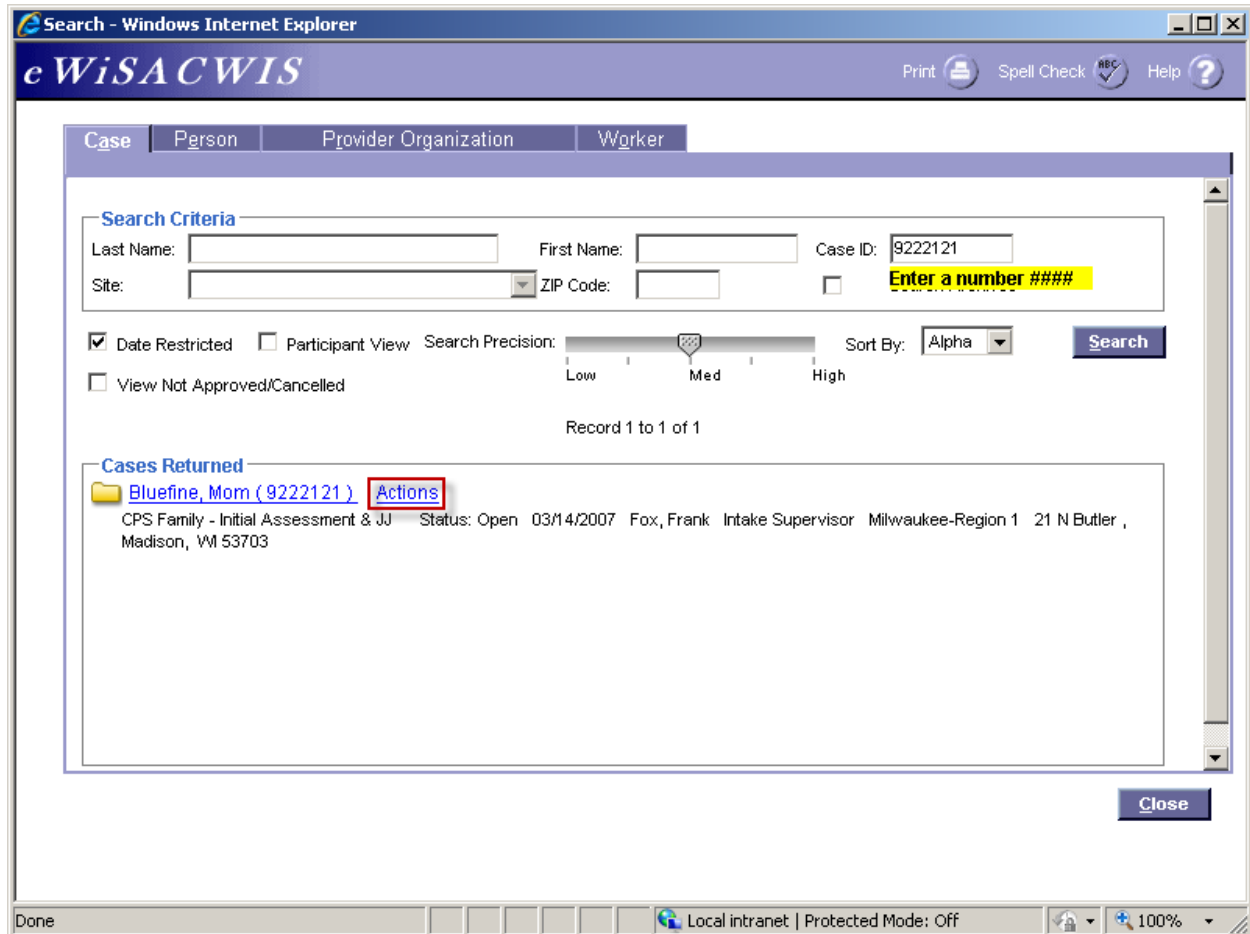
Note: The View Inactive Participants checkbox can be selected. This will display all other participants in the case that may be inactive (due to TPR, Subsidized Guardianship, etc.).

The screenshot shows the 'Case Notes - Windows Internet Explorer' window with the 'eWiSACWIS' header. The page contains the following fields and controls:

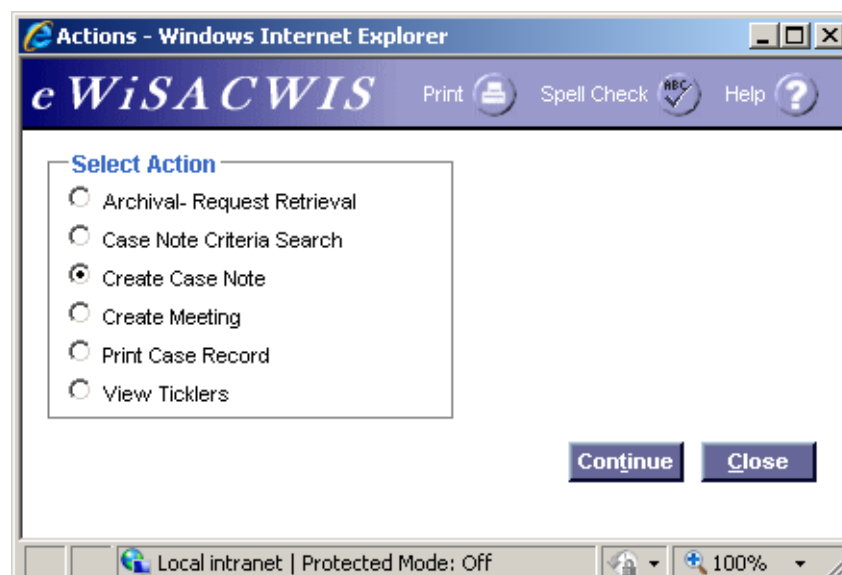
- Case:** Bluefine, Mom (9222121)
- Worker Creating Note:** Cake, Caitlin M.
- Worker Making Contact:** Cake, Caitlin M. [Search](#)
- Case Note ID:**
- Date Entered:** 10/22/2012 03:48 PM
- ☐ Note Finalized
- ☐ Contact By Designee
- Note Information**
 - Date:** 10/01/2012
 - Begin Time:** 10:00 ☒ AM ☐ PM
 - End Time:** 00:00 ☐ AM ☐ PM
 - Duration:** 0000.0
 - ☐ Billable
 - Category:** Ongoing Services
 - Type:** Face-to-Face
 - Type Detail:**
 - Face-to-Face Location:** Details Out of Home Care
 - Face-to-Face Result:** Occurred
 - ☐ View Inactive Participants
 - Participants:**
 - Bluefine, Destro (Bio Child)
 - Bluefine, Gung-Ho (Bio Child)
 - Bluefine, Lady Jaye (Bio Child)
 - Bluefine, Mom (Reference Person)
 - Bluefine, Roadblock (Bio Child)
 - Bluefine, Shipwreck (Bio Child)
 - Hold down the 'Ctrl' key for multi-selection
- Narrative**
 - Case Note 1/1 [Details](#)
 - case note here...
 - [More...](#) [Less...](#) [Default](#)
- Buttons:** Insert Correction Note, Clear Fields, Create, Save, Close

Creating Case Notes from Search (with or without an assignment to the case)

1. From your desktop, click the Search hot button . This will open the Search page.
2. On the Search page, search the case to add a case note to. You do not need to be assigned to the case, and the case can be open or closed. Click the Actions hyperlink next to the case name.



3. Select the Create Case Note radio button and click Continue. This will open the Case Notes page.



4. Complete the required fields and click the Save button when finished.

Note: The case note can be edited up until the note is finalized (30 days after the note was created) by either the worker creating the note or the worker making contact.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

The screenshot shows the 'eWiSACWIS' Case Notes form in a Windows Internet Explorer browser window. The form is titled 'Case Notes - Windows Internet Explorer' and 'eWiSACWIS'. It includes a header with 'Print', 'Spell Check', and 'Help' buttons. The main content area is divided into several sections:

- Case Information:** Case: Bluefine, Mom (9222121), Worker Creating Note: Cake, Caitlin M., Worker Making Contact: Cake, Caitlin M. [Search](#)
- Case Note ID:** (empty), **Date Entered:** 10/22/2012 03:48 PM, ☐ Note Finalized, ☐ Contact By Designee
- Note Information:**
 - Date:** 10/01/2012
 - Begin Time:** 10:00 AM (radio buttons for AM/PM)
 - End Time:** 00:00 AM (radio buttons for AM/PM)
 - Duration:** 0000.0
 - ☐ Billable
 - Category:** Ongoing Services
 - Type:** Face-to-Face
 - Type Detail:** (empty)
 - Face-to-Face Location:** Out of Home Care
 - Face-to-Face Result:** Occurred
 - ☐ View Inactive Participants
 - Participants:** Bluefine, Destro (Bio Child), Bluefine, Gung-Ho (Bio Child), Bluefine, Lady Jaye (Bio Child), Bluefine, Mom (Reference Person), Bluefine, Roadblock (Bio Child), Bluefine, Shipwreck (Bio Child)
- Narrative:**
 - Case Note 1/1** [Details](#)
 - case note here...
 - [More...](#) [Less...](#) [Default](#)

At the bottom of the form are buttons: [Insert Correction Note](#), [Clear Fields](#), [Create](#), [Save](#), and [Close](#). The browser status bar at the bottom shows 'Done', 'Local intranet | Protected Mode: Off', and '100%' zoom.

Viewing Case Notes

1. To view or print multiple notes for a case at one time, from your desktop or from search, click the Actions hyperlink next to the case name. This will open the Actions page.

Search - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS Print Spell Check Help

Case Person Provider Organization Worker

Search Criteria

Last Name: First Name: Case ID: 9221922
Site: ZIP Code: Search Archives

☒ Date Restricted ☐ Participant View Search Precision: Low Med High Sort By: Alpha Search

☐ View Not Approved/Cancelled

Record 1 to 1 of 1

Cases Returned

Oconomowoc, Mother C. (9221922) **Actions**

CPS Family - Ongoing Status: Open 03/20/2008 Wutt, Jason A., V OHC Supervisor Waukesha - HHSD 1176 Cardinal Drive, Oconomowoc, WI 53066

Close

Done Trusted sites

2. On the Actions page, select the Case Note Criteria Search radio button and click Continue.

Actions - Microsoft Internet Explorer provided by D...

eWiSACWIS Print Spell Check Help

Case Person Provider Organization Worker

Select Action

☐ Archival- Request Retrieval
☒ Case Note Criteria Search
☐ Create Case Note
☐ Create Meeting
☐ Print Case Record
☐ View Ticklers

Continue Close

Done Trusted sites

3. Enter the criteria for the notes to be viewed. Start Date, End Date, and at least one Category are required. Once all desired criteria are entered, click the Search button.

Note: The Start Date and End Date pre-fill to retrieve the past 30 days' worth of notes. These dates can be changed to retrieve a greater or lesser timeframe.

Case Note Search Criteria

Note Criteria

Case: Oconomowoc, Mother Number: 9221922 Start Date: 01/01/2000 End Date: 10/14/2010

Hold down the 'Ctrl' key for multi-selection

Category and Type Criteria

Categories		Selected Categories
Access	Add > Add All >> < Remove << Remove All	Access
Adoption		Adoption
Appeal		Appeal
BMCW RN-Intl Assmnt		BMCW RN-Intl Assmnt
BMCW RN-Ongoing		BMCW RN-Ongoing
BMCW Safety Services		BMCW Safety Services
CW Assessmnt Contact		CW Assessmnt Contact

Types	Case Participants
-	AdLitum, Guardian
Access - Collateral	Dog, Deputy
Access - Correspondence	Oconomowoc, Mother C.
Access - Face-to-Face	Oconomowoc, Father B., Sr.
Access - Other	Oconomowoc, Daughter A., II
Access - Telephone Call	Oconomowoc, Son Z., Jr.
Adoption - Collateral	Oconomowoc, Newborn O., III
Adoption - Correspondence	Oconomowoc, PawTaw S.

Search **Close**

Done Trusted sites 100%

- The notes returned can be sorted different ways by clicking the blue column labels like Date Entered, Category, Type, etc. To show notes only for a particular worker, select that worker from the Worker Name drop down. To Print or View one case note, select the appropriate link on the right. To view all these notes at once and have the ability to print these notes, select Print All Notes from the Options drop-down and click 'Go.' This will open the notes in a Microsoft Word document.

Case Note Search Results - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS Print Spell Check Help

Note Criteria
Case: Oconomowoc, Mother Number: 9221922 Start Date: 01/01/2001 End Date: 02/16/2010

Records 1 to 12

Worker Name: All

Notes

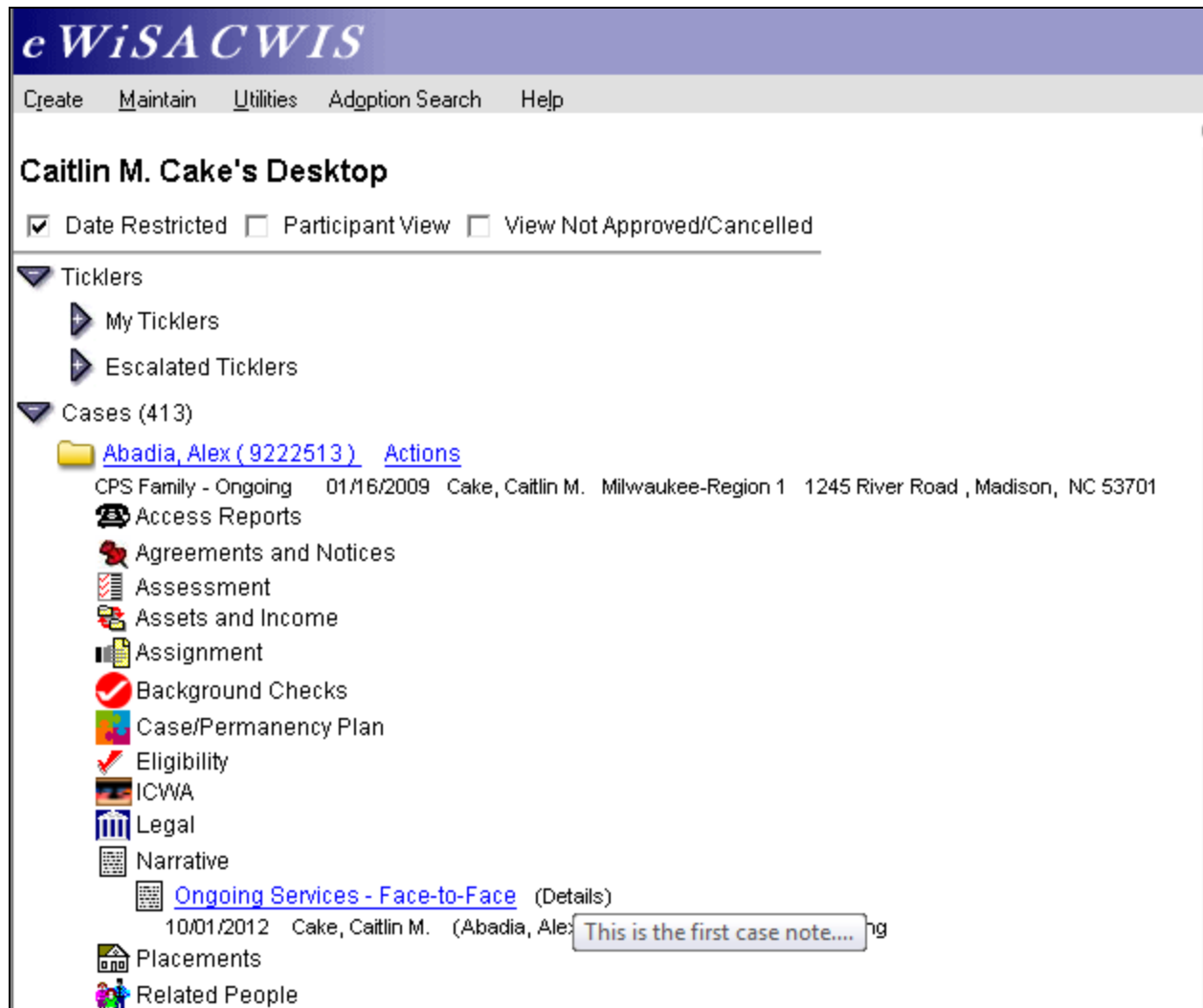
CNID	Date/Time Occurred	Date Entered	Category	Type	Worker Name	Billable		
9222129	10/29/2008 10:00 AM	10/29/2008	Initl Assess Contact	Initial Face-to-Face	Worker, Richard J	No	Print	View
9222088	10/10/2008 08:30 AM	10/10/2008	CW Assessmnt Contact	Face-to-Face	Wutt, Jason A	No	Print	View
9222068	10/07/2008 10:00 AM	10/08/2008	CW Assessmnt Contact	Face-to-Face	Worker, Richard J	No	Print	View
9222031	10/01/2008 01:30 PM	10/01/2008	Ongoing Services	Face-to-Face	Wutt, Jason A	No	Print	View
9222128	09/12/2008 10:10 AM	10/28/2008	Adoption	Correspondence	Worker, Richard J	No	Print	View
9221704	04/08/2008 02:30 PM	04/14/2008	Ongoing Services	Other	Wutt, Jason A	No	Print	View
9221703	04/08/2008 04:00 PM	04/09/2008	Access	Other	Worker, Richard J	No	Print	View
9221700	03/24/2008 10:00 AM	03/25/2008	Initl Assess Contact	Face-to-Face	Wutt, Jason A	No	Print	View
9221696	03/20/2008 12:00 PM	03/20/2008	CW Assessmnt Contact	Other	Worker, Richard J	No	Print	View
9221697	03/20/2008 12:30 PM	03/20/2008	CW Assessmnt Contact	Other	Wutt, Jason A	No	Print	View
9221698	03/20/2008 12:45 PM	03/20/2008	Initl Assess Contact	Initial Face-to-Face	Wutt, Jason A	No	Print	View
9221699	03/20/2008 01:00 PM	03/20/2008	Initl Assess Contact	Face-to-Face	Wutt, Jason A	No	Print	View

Options:

Done Trusted sites

Quick View of Case Notes from the Desktop

From your desktop (or from case search), expand the case, expand the narrative icon, and then put your mouse cursor over the word (Details) to see the first 120 characters of that case note. To view the entire note, click the hyperlink.



eWiSACWIS

Create Maintain Utilities Adoption Search Help

Caitlin M. Cake's Desktop

☒ Date Restricted ☐ Participant View ☐ View Not Approved/Cancelled

Ticklers

- My Ticklers
- Escalated Ticklers

Cases (413)

- Abadia, Alex (9222513) Actions**
 - CPS Family - Ongoing 01/16/2009 Cake, Caitlin M. Milwaukee-Region 1 1245 River Road , Madison, NC 53701
 - Access Reports
 - Agreements and Notices
 - Assessment
 - Assets and Income
 - Assignment
 - Background Checks
 - Case/Permanency Plan
 - Eligibility
 - ICWA
 - Legal
 - Narrative
 - Ongoing Services - Face-to-Face (Details)**
10/01/2012 Cake, Caitlin M. (Abadia, Alex) This is the first case note.... ng
 - Placements
 - Related People